# **VAULT CHECKLIST**

# **Protect Your Important Documents**

With unlimited secure document storage, you can organize and protect your most important documents. Review the checklist below and start adding to your Vault today!

# **LEGAL DOCUMENTS**

- □ Wills
- □ Deeds
- Revocable and Irrevocable Trusts
- Power of Attorney
- □ Codicils (Supplements made to a Will)
- □ Living Wills/Health Directives
- Prenuptial Agreements
- □ Buy/Sell Agreements
- □ Contracts

# **BENEFITS**

- □ Social Security Info
- Veteran's Administration Info
- Employment Benefits

# **INSURANCE POLICIES**

□ (Life, LTD, Disability, Medical, Car, Property)

# **BANK AND INVESTMENT STATEMENTS**

- Pensions, IRAs, Annuities, etc.
- Investment Accounts
- Stock Options/Certificates

# LIABILITIES

- □ List of Credit Cards with Contact Information
- □ Mortgages
- □ Loans

# TAXES

- □ Tax Returns
- □ W-2 Forms

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Home Organizer Goals Spending Investments Vault Reports 💟 🌲			
Vault		+ N	w Folder
Files		search by n	ame
Name +	Size	Shared	Created
Advisors	0 Files	0	9/7/2017 at 12:55 pm
Deeds	0 Files	0	9/7/2017 at 12:55 pm
Insurance	0 Files	0	9/7/2017 at 12:55 pm
Investments	0 Files	0	9/7/2017 at 12:55 pm
Legal	0 Files	0	9/7/2017 at 12:55 pm
My Documents	0 Files	0	9/7/2017 at 12:55 pm
Other	0 Files	0	9/7/2017 at 12:55 pm

# **IDENTIFICATION**

- Birth Certificates
- Drivers Licenses
- □ Passports
- Social Security Cards

# FAMILY

- Adoption Papers
- Medical Records
- □ Marriage License
- □ Pictures
- □ Audio Files
- □ Video Clips

#### PROPERTY

- □ Titles to Homes, Autos, Boats, etc.
- Warranties

